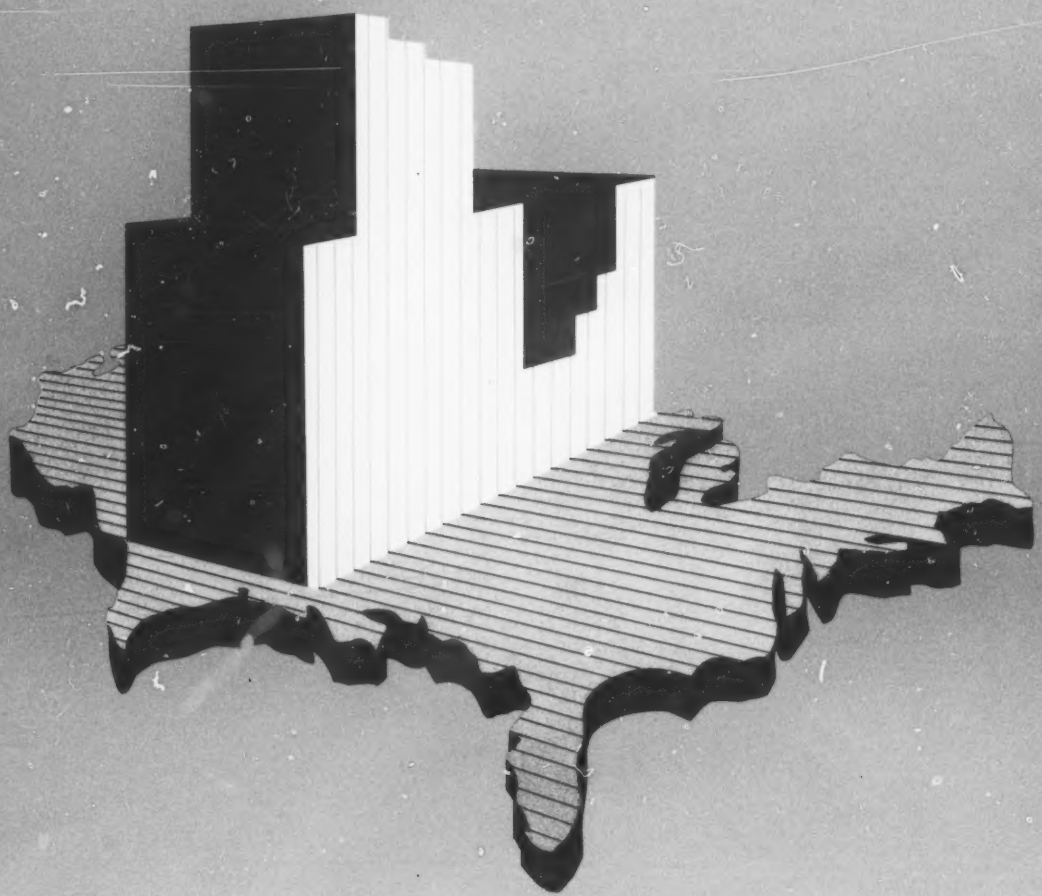
1983

A YEAR-END REPORT

Recreation Vehicle Industry Association



RVs... America's Family Camping Vehicles

Contents

	Page
Industry Highlights	3
Shipments Review	4-5
Market Share by Category/1983	6
Shipments by Region/1983	7
Deliveries to States by RV Category/1983	8
The Marketplace	9
Regional Market Share by RV Category/1983	9
National Market Share of RV Categories by Region/1983	10
RV Unit Deliveries to States by Years, 1976-1983	11
Retail Value of RV Shipments	12
Market Structure by Category and Length	13
The Consumer	15
The RV Market: A Social Values-Based Assessment	15
The Strategic Consumer of the '80s	16
Appendix	17
Cyclical Indicators	17
RV Wholesale Shipments (less Van Conversions) Compared to the Index of Industrial Production	
RV Wholesale Shipments (less Van Conversions) Compared to the Index of Consumer Confidence	
RV Wholesale Shipments (less Van Conversions) Compared to Average Prime Rate Charged by Banks (Inverted)	
RV Categories	18-19

In the report that follows we have presented results of RV production for the year 1983 in several ways. Shipments by product category, product mix, wholesale and retail value of shipments, regional and state-by-state sales patterns are shown in graphic as well as numeric exhibits. In many of the analyses we have offered historical comparisons which are intended to provide insight to emerging trends. And in an Appendix we have compared RV production to widely accepted economic indicators.

All of this is, of course, intended to help the reader draw a clearer picture of the RV market and its performance over time.

Data used for this report were collated from surveys of RV manufacturers conducted annually by RVIA. Monthly reports on unit shipments and average wholesale price by length for each category of RV do not appear in this report. That information is available by contacting the RVIA Marketing Department.

The entire content of this report is the exclusive property of the Recreation Vehicle Industry Association, Inc., with all rights reserved. No reproduction of any kind may be made without the express permission of the RVIA. ■

RVs...America's Family Camping Vehicles
A Year-End Report/1983

Compiled and produced by the RVIA Marketing Committee

Allen Yoder, Jr., Jayco, Inc.
Middlebury, IN, Chairman

John Agno, Stirling Power Systems
Ann Arbor, MI

Robert L. Berner, Citicorp
New York, NY

John Burke, The Coleman Company
Somerset, PA

Jim Carlson, Coachmen Industries
Middlebury, IN

Don Cuzzocrea, Starcraft
Topeka, IN

Bill Doyle, Western Recreation Vehicles
Yakima, WA

Fred G. Emmert, Winnebago Industries
Forest City, IA

Ed Hafner, Onan Corporation
Minneapolis, MN

Jean Janc, Holiday Rambler Corp.
Wakarusa, IN

Richard Matz, Norcold Corp.
Sidney, OH

Scott Penny, Fleetwood Enterprises
Riverside, CA

Terry Quinn, Hehr International Inc.
Los Angeles, CA

Joseph Redhage, Atwood Mobile Products
Rockford, IL

Ron Rosalik, Hoover Universal Towing Systems
Belleville, MI

RVIA Staff

Mac Bryan
Vice President, Administration

Suzanne Branner
Information Supervisor
Marketing Department

Claudene Spence
Data Collector

Julia Herron
Director of Publications

Design: Communication Graphics Group, Inc.

© 1984 **Recreation Vehicle Industry Association**

14650 Lee Road / Chantilly, VA 22021 / (703) 968-7722

Price: One copy free to Members
All others $5.75

Industry Highlights

1983 was an outstanding year for the recreation vehicle industry; retail value of sales reached a record high $6.3 billion. For the third consecutive year wholesale shipments increased; in 1983 they totalled 358,000 units, a 38.8% improvement over 1982.

There are many reasons for the successes of 1983. High among them are: (1) low beginning dealer inventory (2) an improved lending climate and (3) a generally improved consumer willingness to buy.

Looking back to 1980, we find wholesale shipments were considerably lower than retail sales,[1] as dealers worked off their inventories. In the several years that followed, wholesale and retail sales reflected a striking resemblance to each other as dealer financing costs prohibited inventory building. During this period dealers were merely replacing retail sales. But that was not the case in 1983, as for the first time since the late '70s dealers began to restock in anticipation of retail sales.

Not only had dealer flooring expenses come down, but consumer financing was also improving.[2] Nominal interest rates were lower and maturities longer which brought monthly payments back to within tolerable levels for the potential buyer. Lower interest rates also meant a smaller return on investments for the cash purchaser making the decision to buy an RV more favorable.

Perhaps the most important element in the equation is the overall improved buyer attitude. The financial situation of consumers made substantial improvements in 1983 and their attitudes about continued improvements soared.[3]

While deliveries to retailers in 1983 were below the all-time record, they were higher than 1982 month for month and the highest total in five years. The number of RVIA member plants also increased 38% over the year before; but even so, it has been estimated that capacity utilization within the industry remained below 80%. This has led some industry experts to predict further gains in wholesale shipments of RVs over the next several years.

Month for month, shipments were greater than last year.

The first quarter of calendar 1983 began with a rush as deliveries to retailers totaled 82,300 units, 47 per cent greater than one year earlier. On a seasonally adjusted annual rate (SAAR) basis shipments had grown nearly 5% from the final quarter of 1982 to the first quarter of 1983.

The growth trend continued into the second quarter as shipments totaled 107,400 units, 34.6% higher than for the same period in 1982. While the SAAR had slipped slightly (down 1.5% from the 1st quarter) all product categories remained above levels recorded for the previous year. Shipments actually peaked in June at 36,300 units but April and May weren't far behind at 36,000 and 35,100 units respectively. Not since the summer of 1978 had shipments in one quarter been this great.

Traditionally, the dog days of July, August and September were lower than the previous quarter, but they were still nearly 38% better than the same quarter in 1982. Seasonally adjusted, deliveries had grown 14% from the previous quarter.

The final quarter followed the pattern set in the three quarters before it, as all categories finished better than the year before. With 80,800 units delivered, the fourth quarter was 37.5% better than the final quarter of 1982 and the yearly totals exceeded the 300,000 mark for the first time in four years.

Van conversions were again this year's most popular category, growing by 38.5% from 1982. As seen on pages 4 and 5, van conversions totaled 154,000 units while all travel trailers improved 37.4% to 90,000 units delivered.

Vans did well . . . Motor homes did better!

All motor homes finished third with 69,500 units, but increased an amazing 68.7% over last year's results. Truck campers and folding camping trailers followed with impressive percentage increases but at lower levels of shipments.

Geographically, we found some changes occurred in the percentage distribution by census region. While the Pacific and East North Central remained one and two respectively, the South Atlantic region moved into third place ahead of the West South Central region (see page 9). No surprises in state rankings. California (12.73%), Texas (7.25%), Florida (5.70%) and Michigan (4.35%) were once again the top four finishes by state (see page 11). Rounding out the top ten states, we have Ohio, Pennsylvania, Arizona, Illinois, Indiana and Washington.

Some minor changes occurred in the product sizing this year; generally, unit lengths were on the rise. For instance in travel trailers, the majority this year were above 25 feet in length as opposed to 1982 when the majority were smaller than 25 feet (see page 13). And in conventional type A motor homes nearly eight of ten were 26 feet or more in length, when five years earlier this size group accounted for only four in ten.

On the average, units were bigger this year than last.

With the somewhat increased overall size of the RV and the consensus view that more accessories were installed in the 1983 versions, RVs increased in average price by nearly 30%. Motorized products showed the largest gains, led by a 33% increase in the average retail value of van conversions (see page 19). Type C chopped vans, were up a more modest 20% while the average type A, conventional motor home, increased only 13% over a-year-earlier prices. In the towable category the average travel trailer increased by 19% while folding camping trailers averaged a 2% increase over 1982 retail values.

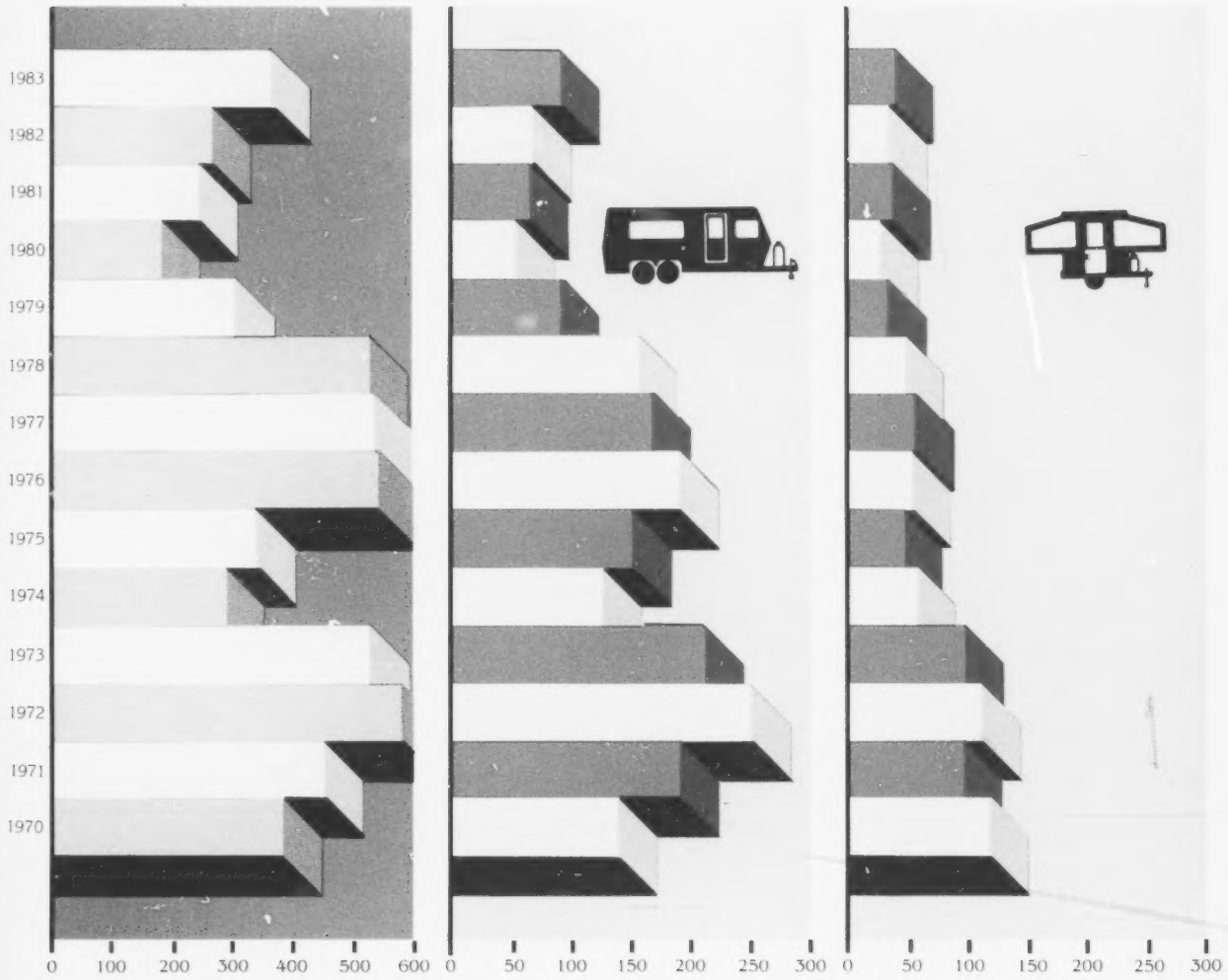
But whatever shape, size or price of RV sold, it was the consumer's eagerness to buy that made all these successes possible. On pages 15 and 16 we have presented an analysis of the changes in social values now underway and why these changes will continue to favor the RV lifestyle. ■

[1] See Index of Retail Activity, RVIA Monthly Marketing Report, December 1983, page 13.

[2] See Recreation Vehicle Financing, 1982 Annual Survey of Financial Institutions, pages 2-4. ©1983 RVIA.

[3] See Index of Consumer Sentiment, University of Michigan's Survey of Consumer Attitudes, January 1984.

Shipments Review 1970-1983 (in thousands)



Total Shipments

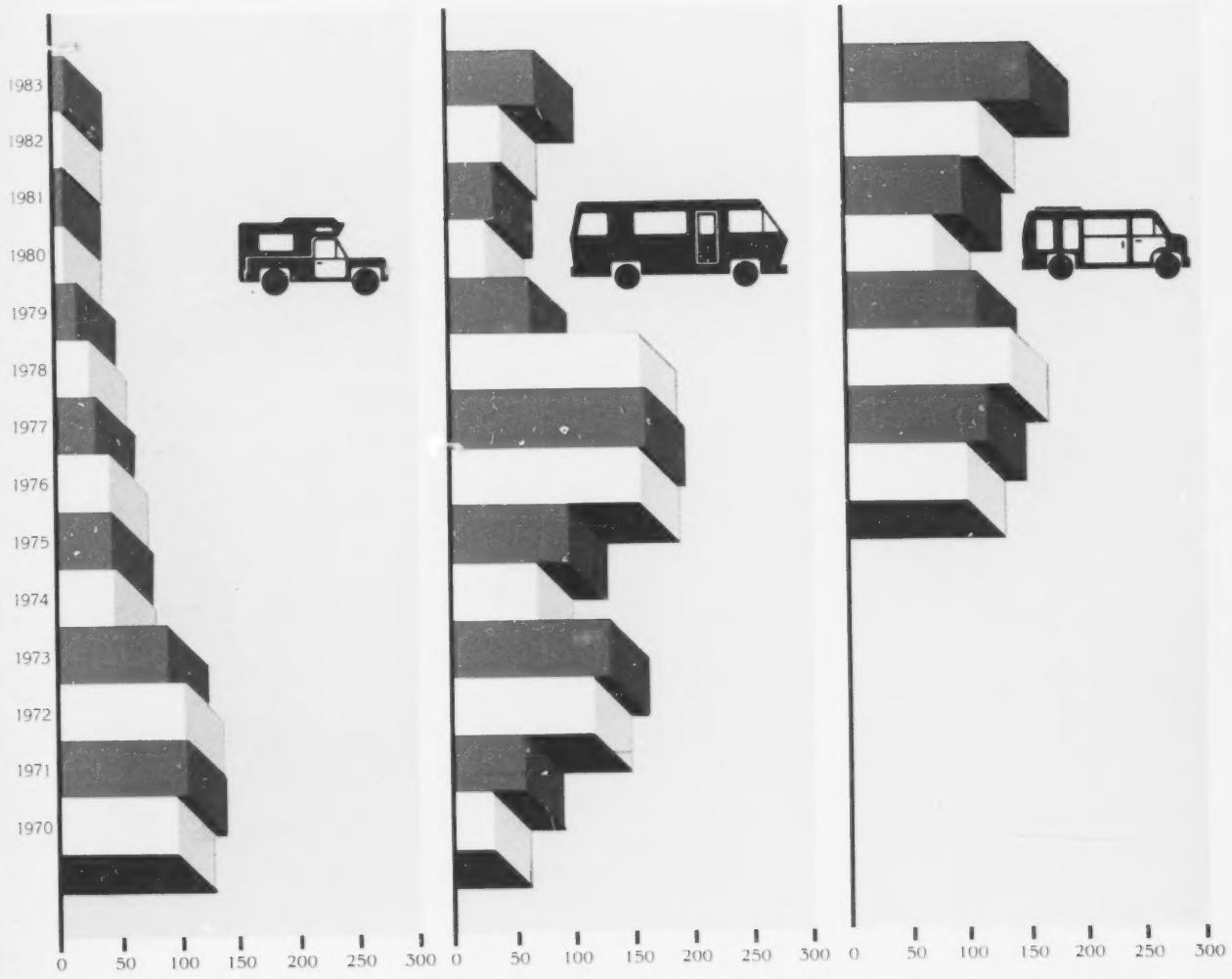
Year	Shipments
1983	358.0
1982	258.0
1981	239.1
1980	181.4
1979	307.7
1978	526.3
1977	533.9
1976	541.1
1975	339.6
1974	295.8
1973	528.8
1972	582.9
1971	451.0
1970	380.3

Travel Trailers (All Types)

Year	Shipments
1983	90.0
1982	65.5
1981	63.8
1980	52.0
1979	90.2
1978	159.8
1977	167.9
1976	189.7
1975	150.6
1974	126.3
1973	212.3
1972	250.8
1971	190.8
1970	138.0

Folding Camping Trailers

Year	Shipments
1983	37.5
1982	34.3
1981	35.0
1980	24.5
1979	31.1
1978	48.2
1977	53.9
1976	53.3
1975	48.1
1974	55.2
1973	97.7
1972	110.2
1971	95.8
1970	116.1



Truck Campers

Year	Shipments
1983	6.8
1982	5.7
1981	5.1
1980	5.0
1979	13.8
1978	24.7
1977	31.9
1976	42.0
1975	44.3
1974	45.4
1973	89.8
1972	105.1
1971	107.2
1970	95.9

Motor Homes (All Types)

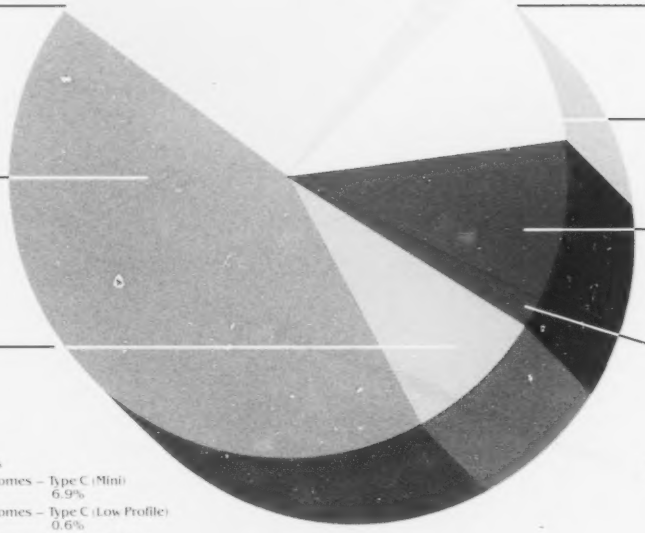
Year	Shipments
1983	69.5
1982	41.2
1981	35.4
1980	28.5
1979	64.1
1978	157.2
1977	160.2
1976	156.1
1975	96.6
1974	68.9
1973	129.0
1972	116.8
1971	57.2
1970	30.3

Van Conversions

Year	Shipments
1983	154.2
1982	111.3
1981	99.8
1980	71.4
1979	108.5
1978	136.4
1977	120.0
1976	100.0
1975	*
1974	*
1973	*
1972	*
1971	*
1970	*

*No Van Conversion data prior to 1976

Market Share by Category/1983



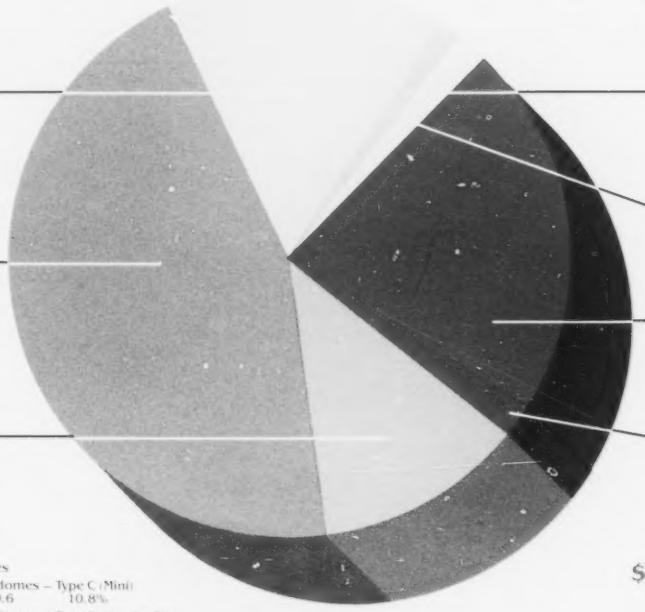
	Shipments in Thousands	Percent of Total
Travel Trailers (All) [1]	90.0	25.1%
Van Conversions	154.2	43.1%
Motor Homes – Type C [2]	30.5	8.5%
Truck Campers	6.8	1.9%
Folding Camping Trailers	37.5	10.5%
Motor Homes – Type A	33.4	9.3%
Motor Homes – Type B	5.6	1.6%
Shipments	**Total RVs**	
	358.0	100.0%

1 Includes

Conventional Travel Trailers	64.7	18.1%
Park Trailers	7.2	2.0%
Fifth Wheel Trailers	18.1	5.0%

2 Includes

Motor Homes – Type C (Mini)	24.8	6.9%
Motor Homes – Type C (Low Profile)	2.2	0.6%
Motor Homes – Type C (Compact)	3.5	1.0%



	$ Value in Millions	Percent of Total
Travel Trailers (All) [1]	$1,066.7	16.8%
Van Conversions	$2,837.4	44.9%
Motor Homes – Type C [2]	$801.5	12.7%
Truck Campers	$ 36.1	0.6%
Folding Camping Trailers	$ 122.3	1.9%
Motor Homes – Type A	$1,345.9	21.3%
Motor Homes – Type B	$ 113.8	1.8%
Retail Value	**Total RVs**	
	$6,323.7	100.0%

1 Includes

Conventional Travel Trailers	$712.6	11.2%
Park Trailers	$106.2	1.7%
Fifth Wheel Trailers	$247.9	3.9%

2 Includes

Motor Homes – Type C (Mini)	$679.6	10.8%
Motor Homes – Type C (Low Profile)	$ 56.0	0.9%
Motor Homes – Type C (Compact)	$ 65.9	1.0%

Shipments by Region/1983

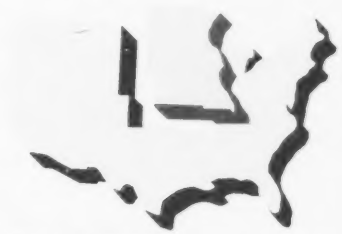
Pacific

Year	Percent
1983	19.50%
1982	18.87%
1981	20.86%
1980	20.25%
1979	21.58%
1978	22.85%

Mountain

Year	Percent
1983	10.58%
1982	10.06%
1981	10.62%
1980	9.65%
1979	10.00%
1978	10.11%

West North Central



Year	Percent
1983	10.21%
1982	10.15%
1981	9.51%
1980	8.18%
1979	10.44%
1978	10.42%

West South Central

Year	Percent
1983	11.51%
1982	14.43%
1981	13.92%
1980	13.29%
1979	9.72%
1978	10.29%

East North Central

Year	Percent
1983	17.89%
1982	18.04%
1981	16.39%
1980	17.44%
1979	19.49%
1978	20.21%

East South Central

Year	Percent
1983	3.40%
1982	3.50%
1981	3.18%
1980	3.00%
1979	3.56%
1978	3.33%

South Atlantic

Year	Percent
1983	13.20%
1982	12.42%
1981	12.87%
1980	13.38%
1979	11.55%
1978	10.56%

Middle Atlantic

Year	Percent
1983	8.62%
1982	8.77%
1981	9.30%
1980	11.06%
1979	10.15%
1978	9.23%

New England

Year	Percent
1983	3.76%
1982	3.74%
1981	3.36%
1980	3.75%
1979	3.15%
1978	3.00%

Deliveries to States by RV Category/1983

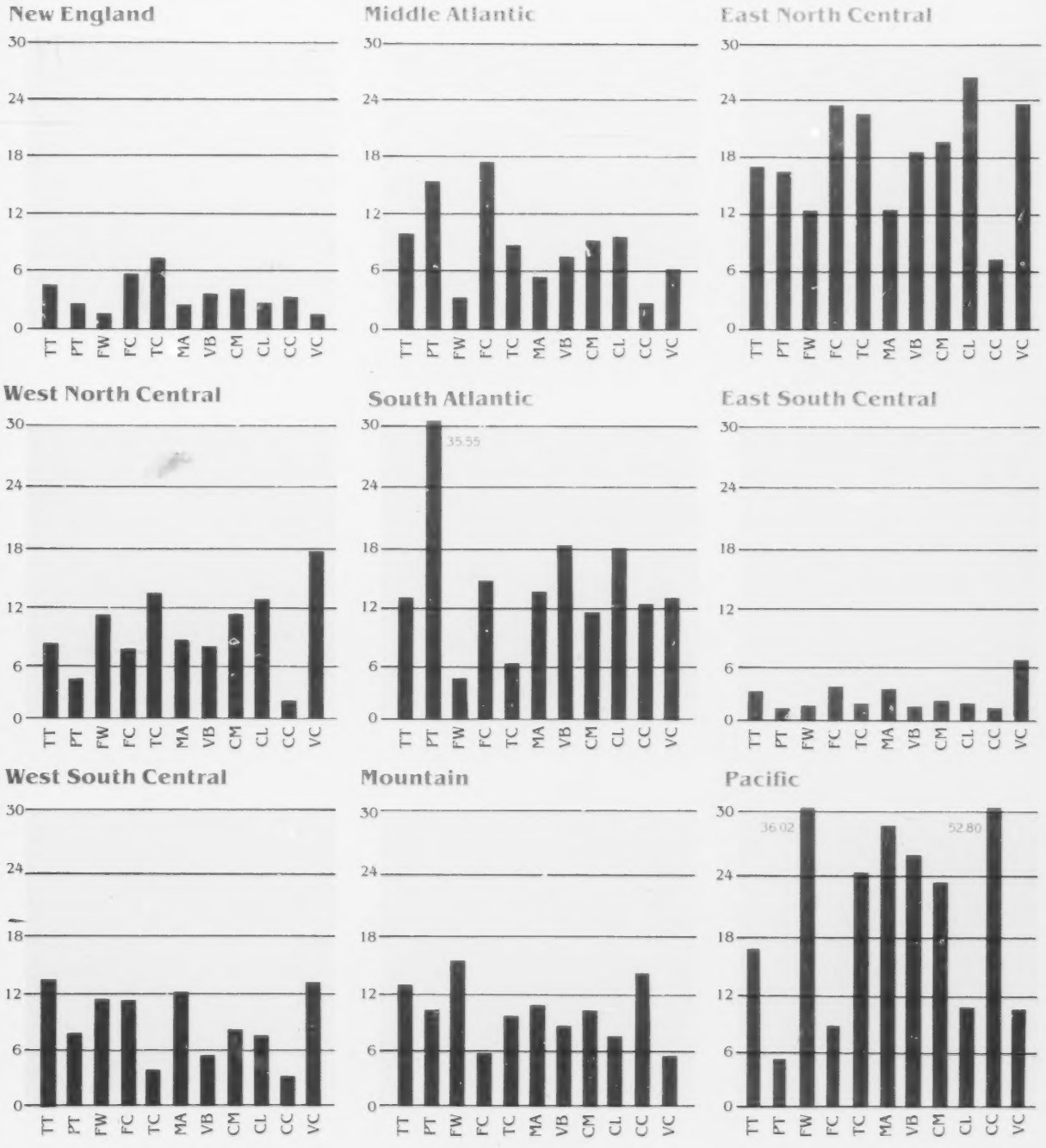
(In Percentage)

	Conventional Travel Trailers	Park Trailers	Fifth Wheel Trailers	Folding Camping Trailers	Truck Campers	Motor Homes Type A	Van Campers Type B	Motor Homes Type C (Mini)	Motor Homes Type C (Low Profile)	Motor Homes Type C (Compact)	Van Conversions	1983 Total
New England	**4.89%**	**2.75%**	**1.81%**	**5.82%**	**7.32%**	**2.71%**	**3.93%**	**4.13%**	**2.80%**	**3.27%**	**1.57%**	**3.76%**
Connecticut	.92	.27	.22	1.32	.69	.39	.86	.87	.76	.09	.43	.70
Maine	.69	.09	.46	.84	1.47	.28	.38	.42	.04	.28	.38	.53
Massachusetts	1.84	1.53	.65	2.53	2.03	1.22	.48	1.47	.85	1.80	.48	1.45
New Hampshire	.92	.46	.30	.82	2.90	.49	.77	.6^	.72	.85	.20	.68
Rhode Island	.32	.07	.11	.11	.03	.30	.77	.52	.30	.19	.04	.25
Vermont	.22	.34	.07	.20	.20	.04	.67	.21	.13	.05	.04	.15
Middle Atlantic	**9.93**	**15.53**	**3.51**	**17.52**	**8.67**	**5.39**	**7.77**	**9.06**	**9.91**	**2.80**	**6.06**	**8.82**
New Jersey	1.86	4.16	.36	2.51	.37	.96	1.63	1.42	2.16	1.14	1.62	1.57
New York	3.48	2.47	1.63	5.94	3.74	1.87	2.02	3.47	3.64	1.56	1.06	3.00
Pennsylvania	4.76	8.90	1.52	9.07	3.56	2.56	4.13	4.17	4.11	.09	2.76	4.25
E. North Central	**16.87**	**16.33**	**12.62**	**23.69**	**22.98**	**12.38**	**18.71**	**19.66**	**26.18**	**7.20**	**23.84**	**17.89**
Illinois	3.71	4.73	2.72	4.80	3.08	2.44	1.44	3.61	6.01	.57	6.49	3.91
Indiana	3.11	2.61	2.77	2.60	6.23	3.27	4.41	4.22	4.74	2.04	4.50	3.45
Michigan	4.36	3.55	3.93	6.73	5.15	3.00	6.91	5.11	7.54	1.66	3.72	4.35
Ohio	3.80	2.95	1.94	6.14	3.66	2.69	5.57	4.32	6.06	2.04	7.91	4.32
Wisconsin	1.89	2.49	1.25	3.41	4.88	.98	.38	2.41	1.82	.90	1.22	1.86
W. North Central	**8.22**	**4.18**	**11.02**	**7.79**	**13.17**	**8.62**	**7.97**	**11.01**	**13.00**	**2.13**	**17.89**	**10.12**
Iowa	1.40	.71	1.79	1.14	1.68	1.81	.96	2.50	6.01	1.09	3.73	1.99
Kansas	.89	.32	2.67	.97	1.22	1.45	.10	1.31	.97	.76	2.23	1.34
Minnesota	2.15	2.19	1.67	1.20	5.47	1.83	3.26	3.55	2.75	.19	5.31	2.65
Missouri	2.36	.55	2.49	2.80	.81	1.78	2.69	1.51	1.48	*	3.87	2.30
Nebraska	.58	.04	1.35	.76	.84	.59	.10	.63	.55	*	1.31	.75
North Dakota	.50	.14	.45	.34	1.32	.66	.77	.98	1.19	*	.83	.62
South Dakota	.35	.23	.61	.31	1.83	.50	.10	.53	.04	.09	.61	.47
South Atlantic	**13.13**	**35.55**	**4.84**	**14.83**	**6.23**	**13.61**	**18.71**	**11.60**	**18.17**	**12.51**	**13.15**	**13.20**
Delaware	.38	1.31	.09	.02	.38	.13	*	.15	*	*	.26	.26
Florida	3.81	25.30	2.42	3.65	1.83	7.64	7.10	5.65	8.81	9.48	6.66	5.70
Georgia	1.19	.27	.19	1.70	.76	.77	.19	.95	1.86	.24	.96	.99
Maryland	1.60	1.60	.35	2.50	.79	1.24	1.73	1.03	1.61	.52	.97	1.35
North Carolina	2.57	1.46	.67	3.08	.92	1.60	4.41	1.39	1.61	1.52	1.12	1.89
South Carolina	1.28	2.04	.46	.96	.25	.52	.96	.49	.55	*	1.07	.92
Virginia	1.53	3.00	.40	2.11	.89	1.39	3.36	1.26	3.05	.57	1.66	1.51
West Virginia	.77	.57	.26	.82	.41	.32	.96	.67	.68	.19	.44	.58
E. South Central	**3.11**	**1.07**	**1.72**	**3.75**	**1.78**	**3.47**	**1.63**	**2.36**	**2.33**	**1.18**	**6.64**	**3.40**
Alabama	.78	.36	.20	1.27	.10	1.11	.19	.54	.51	.14	1.92	.93
Kentucky	.68	.25	.33	.73	.66	.46	.58	.58	.59	.62	1.43	.70
Mississippi	.56	.18	.22	.39	.20	.49	.19	.17	*	.09	1.34	.54
Tennessee	1.09	.28	.97	1.35	.81	1.41	.67	1.08	1.23	.33	1.94	1.23
W. South Central	**13.09**	**7.89**	**11.60**	**11.19**	**3.97**	**12.13**	**5.66**	**8.24**	**7.88**	**3.32**	**13.18**	**11.51**
Arkansas	1.21	.21	.72	1.20	.46	.75	.19	.63	1.14	.05	1.85	1.05
Louisiana	1.61	.53	.50	1.20	.18	1.73	.58	1.07	.68	.95	2.64	1.50
Oklahoma	1.50	.89	2.54	1.57	.36	1.59	1.73	1.19	1.99	.47	2.86	1.71
Texas	8.78	6.25	7.84	7.23	2.97	8.07	3.17	5.35	4.07	1.85	5.82	7.25
Mountain	**13.05**	**10.36**	**15.53**	**5.98**	**9.48**	**10.64**	**8.93**	**10.16**	**7.84**	**14.74**	**5.65**	**10.58**
Arizona	6.45	9.61	2.43	1.33	1.12	3.72	6.62	2.54	1.14	4.36	1.68	3.98
Colorado	.95	.32	2.62	1.39	1.47	1.93	.10	2.20	1.36	3.89	.63	1.40
Idaho	1.26	.05	2.60	.62	1.22	.79	1.34	.73	.04	.90	.60	1.02
Montana	.81	.09	2.04	.73	.84	.73	.38	.90	.47	1.80	1.16	.93
Nevada	.74	.12	1.51	.17	1.02	1.46	*	.78	1.99	1.47	.22	.80
New Mexico	.77	.12	1.26	1.21	2.70	.95	.48	1.32	1.65	1.47	.38	.93
Utah	1.85	.04	2.66	.48	.99	.92	*	1.46	1.06	.85	.65	1.31
Wyoming	.22	*	.41	.04	.13	.15	*	.23	.13	*	.34	.21
Pacific	**16.77**	**5.28**	**36.02**	**8.81**	**24.76**	**28.76**	**25.82**	**23.20**	**10.63**	**52.80**	**10.39**	**19.50**
Alaska	.13	.02	.07	.02	1.02	.51	2.11	.86	.13	1.47	.04	.29
California	10.08	3.84	21.72	6.32	18.20	20.76	2.69	16.57	2.63	40.52	6.08	12.73
Hawaii	*	*	*	*	.03	.01	*	*	*	*	.06	.01
Oregon	2.90	.14	7.35	.99	2.11	3.90	7.01	2.92	4.11	7.39	1.54	3.03
Washington	3.66	1.28	6.88	1.47	3.41	3.58	14.01	2.85	3.77	3.41	2.67	3.44
Foreign	.95	1.07	1.33	.63	1.63	2.25	.86	.57	1.27	.05	1.64	.01
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100 %**

*Not measurable

Regional Market Share by RV Category/1983

(In Percentage)



Legend

TT	Conventional Travel Trailers
PT	Park Trailers
FW	Fifth Wheel Trailers
FC	Folding Camping Trailers
TC	Truck Campers
MA	Motor Homes – Type A
VB	Van Campers – Type B
CM	Motor Homes – Type C (Mini)
CL	Motor Homes – Type C (Low Profile)
CC	Motor Homes – Type C (Compact)
VC	Van Conversions

National Market Share of RV Categories by Region/1983 (by Percent)

NE - New England
Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

MA - Middle Atlantic
New Jersey, New York, Pennsylvania

ENC - East North Central
Illinois, Indiana, Michigan, Ohio, Wisconsin

WNC - West North Central
Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota

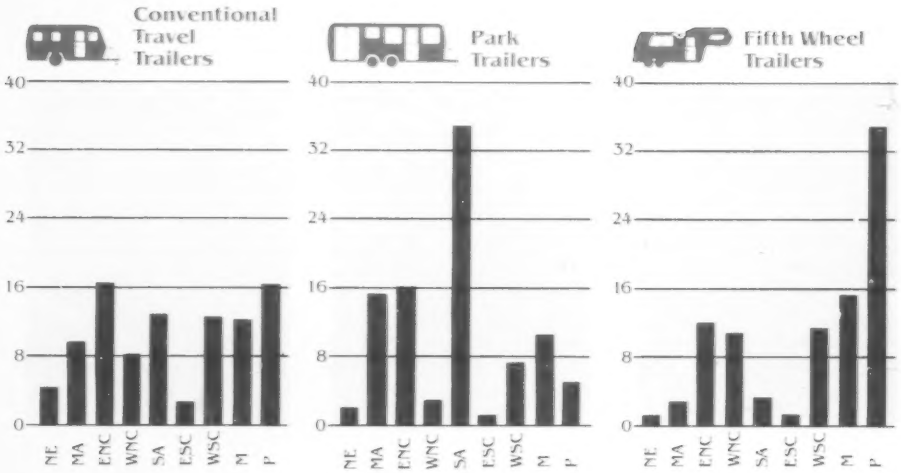
SA - South Atlantic
Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia

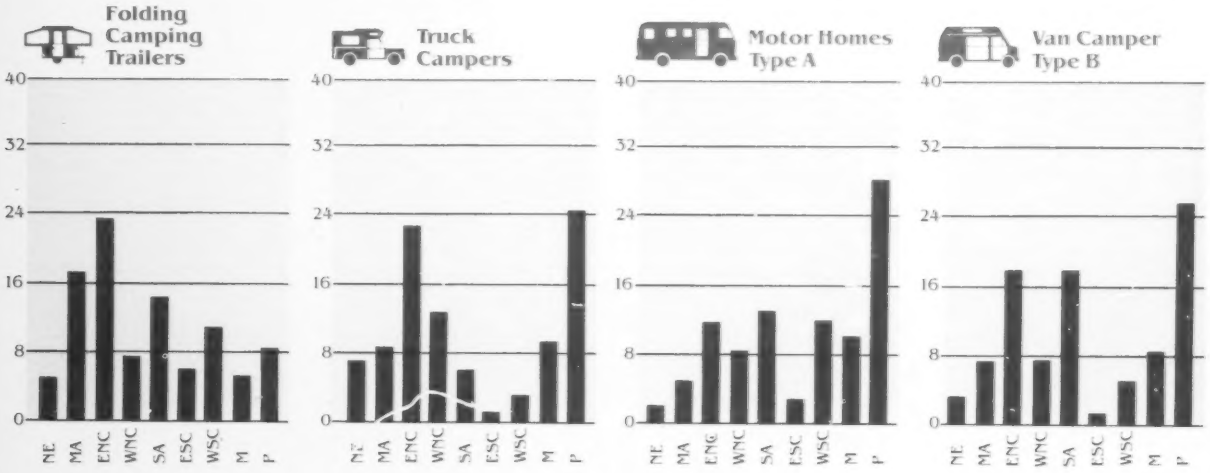
ESC - East South Central
Alabama, Kentucky, Mississippi, Tennessee

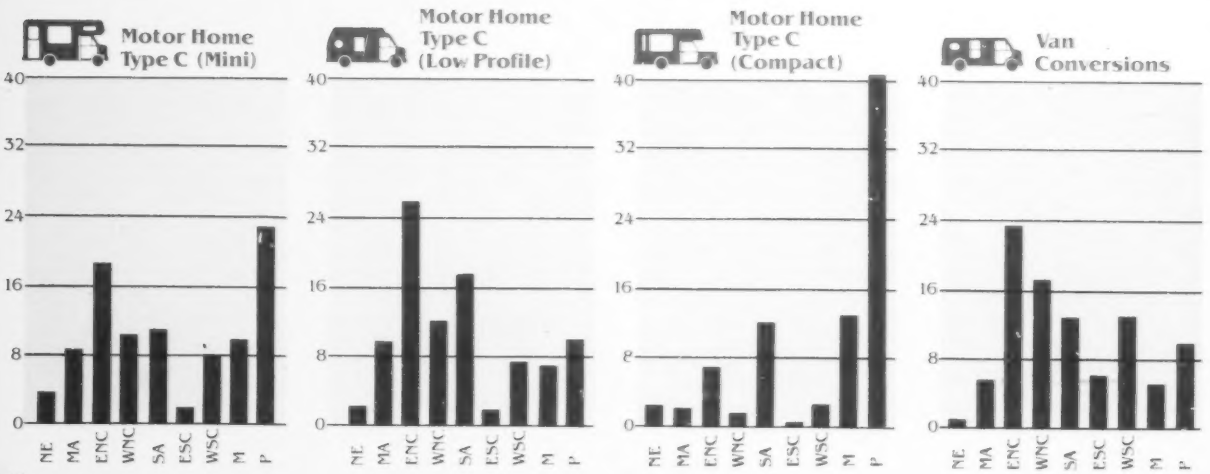
WSC - West South Central
Arkansas, Louisiana, Oklahoma, Texas

M - Mountain
Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming

P - Pacific
Alaska, California, Hawaii, Oregon, Washington







RV Unit Deliveries to States by Years, 1976 – 1983 (in percentage)

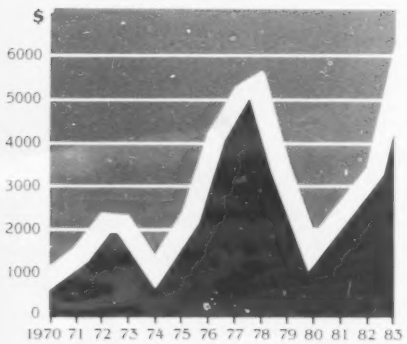
	1983	1982	1981	1980	1979	1978	1977	1976
New England	**3.76%**	**3.74%**	**3.36%**	**3.75%**	**3.15%**	**3.00%**	**3.46%**	**3.61%**
Connecticut	.70	.69	.59	.68	.67	.61	.66	.70
Maine	.53	.44	.39	.33	.42	.44	.62	.54
Massachusetts	1.45	1.48	1.35	1.54	1.17	1.16	1.27	1.40
New Hampshire	.68	.66	.59	.77	.52	.46	.60	.62
Rhode Island	.25	.29	.28	.30	.22	.17	.17	.19
Vermont	.15	.18	.16	.13	.15	.16	.14	.16
Middle Atlantic	**8.82**	**8.77**	**9.30**	**11.05**	**10.15**	**9.23**	**9.77**	**9.97**
New Jersey	1.57	1.65	1.62	1.62	1.50	1.45	1.45	1.47
New York	3.00	3.01	3.40	4.15	4.39	3.82	3.84	3.74
Pennsylvania	4.25	4.11	4.28	5.29	4.61	3.96	4.48	4.76
East North Central	**17.89**	**18.04**	**16.39**	**17.44**	**19.49**	**20.21**	**21.05**	**22.17**
Illinois	3.91	4.02	3.55	3.32	3.85	3.88	4.30	4.60
Indiana	3.45	3.80	3.51	3.62	3.83	3.54	3.50	3.78
Michigan	4.35	4.54	3.65	4.47	4.89	5.93	5.69	5.95
Ohio	4.32	4.03	4.06	4.36	4.76	4.79	5.20	5.23
Wisconsin	1.86	1.65	1.62	1.67	2.15	2.07	2.36	2.61
West North Central	**10.12**	**10.15**	**9.51**	**8.18**	**10.44**	**10.42**	**10.81**	**12.29**
Iowa	1.99	2.11	2.15	1.78	2.21	2.17	2.17	2.54
Kansas	1.34	1.52	1.53	1.60	1.36	1.52	1.79	2.10
Minnesota	2.65	1.96	1.91	1.61	2.64	2.57	2.62	2.81
Missouri	2.30	2.41	1.90	1.85	2.05	2.03	1.91	2.19
Nebraska	.75	1.06	.88	.70	.98	.97	.99	1.09
North Dakota	.62	.60	.57	.23	.63	.58	.68	.86
South Dakota	.47	.49	.57	.41	.57	.58	.65	.70
South Atlantic	**13.20**	**12.42**	**12.87**	**13.38**	**11.55**	**10.56**	**10.02**	**10.95**
Delaware	.26	.20	.22	.33	.21	.23	.20	.22
Florida	5.70	4.70	4.85	4.77	3.65	3.17	2.61	2.57
Georgia	.99	1.29	1.35	1.32	1.50	1.29	1.31	1.43
Maryland	1.35	1.27	1.27	1.42	1.45	1.31	1.41	1.52
North Carolina	1.89	1.83	2.06	1.95	1.51	1.60	1.52	1.61
South Carolina	.92	.71	.84	.77	.62	.59	.56	.65
Virginia	1.51	1.70	1.39	1.79	1.47	1.48	1.53	2.10
West Virginia	.58	.72	.87	1.03	1.14	.89	.88	.85
East South Central	**3.40**	**3.50**	**3.18**	**3.00**	**3.56**	**3.33**	**3.02**	**2.95**
Alabama	.93	.80	.83	.71	1.08	94	.66	.69
Kentucky	.70	.60	.50	.43	.60	.83	.85	.65
Mississippi	.54	.55	.51	.42	.57	.46	.40	.47
Tennessee	1.23	1.55	1.34	1.44	1.32	1.10	1.11	1.14
West South Central	**11.51**	**14.43**	**13.92**	**13.29**	**9.72**	**10.29**	**10.32**	**11.03**
Arkansas	1.05	.94	.84	.94	.71	.73	.69	.72
Louisiana	1.50	1.64	2.07	2.15	1.33	1.34	1.12	1.23
Oklahoma	1.71	2.72	3.07	1.98	1.76	1.87	2.08	2.30
Texas	7.25	9.13	7.94	8.22	5.92	6.35	6.43	6.78
Mountain	**10.58**	**10.06**	**10.62**	**9.65**	**10.00**	**10.11**	**9.84**	**8.76**
Arizona	3.98	2.55	2.34	1.70	1.63	1.68	1.44	1.38
Colorado	1.40	1.66	1.61	2.01	2.19	2.18	2.52	2.42
Idaho	1.02	1.02	1.24	1.11	1.10	1.40	1.32	1.12
Montana	.93	.80	.87	.65	.87	.87	.87	.59
Nevada	.80	.93	1.28	1.05	1.05	.84	.58	.54
New Mexico	.93	.93	1.08	.68	1.02	.98	1.03	1.08
Utah	1.31	1.80	1.75	2.04	1.66	1.71	1.59	1.26
Wyoming	.21	.37	.45	.41	.48	.45	.49	.37
Pacific	**19.50**	**18.87**	**20.86**	**20.25**	**21.58**	**22.85**	**21.71**	**18.26**
Alaska	.29	.28	.31	.09	.18	.30	.30	.25
California	12.73	12.87	14.80	14.33	14.49	14.68	13.73	11.60
Hawaii	.01	.01	.02	.01	.01	.01	.01	.02
Oregon	3.03	2.78	2.56	2.63	3.10	3.51	3.36	2.87
Washington	3.44	2.93	3.17	3.19	3.80	4.35	4.31	3.52
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Note: Parts may not add to totals due to rounding.

Source: Data for shipment statistics are obtained from an annual survey to RV manufacturers and are calculated from completed survey forms.

Retail Value of RV Shipments (in millions)

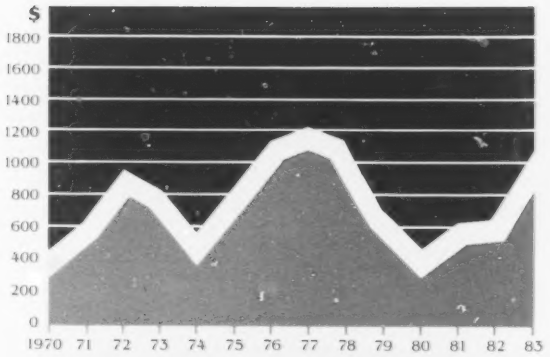
Total Value



Year	Total Value	% Change All Types
1983	$6,323.7	+80.4
1982	3,505.2	+26.3
1981	2,774.8	+42.2
1980	1,950.7	−45.0
1979	3,581.5	−37.0
1978	5,682.8	+ 6.7
1977	5,326.7	+24.3
1976	4,283.9	+84.6
1975	2,320.0	+66.7
1974	1,392.1	−40.1
1973	2,322.4	−1.8
1972	2,364.9	+48.1
1971	1,597.2	+42.4
1970	1,122.0	+7.6

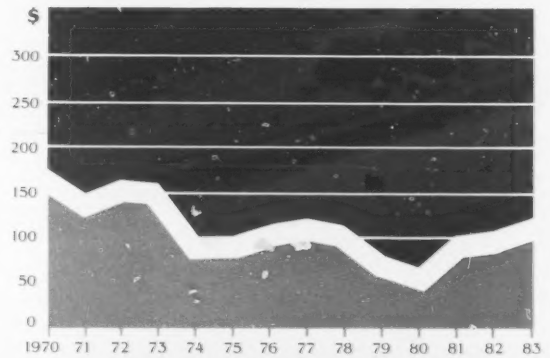
All Travel Trailers

Year	Value
1983	$1,066.7
1982	666.0
1981	631.1
1980	484.6
1979	725.1
1978	1,153.0
1977	1,229.2
1976	1,132.0
1975	856.0
1974	566.6
1973	842.6
1972	971.1
1971	650.2
1970	445.3



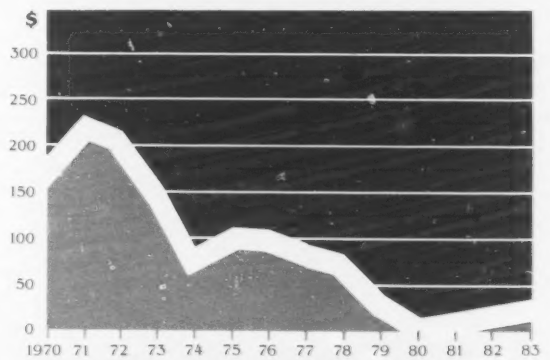
Folding Camping Trailers

Year	Value
1983	$122.3
1982	109.6
1981	105.3
1980	68.6
1979	83.3
1978	115.8
1977	123.2
1976	116.8
1975	101.0
1974	108.9
1973	160.1
1972	165.5
1971	150.9
1970	175.3



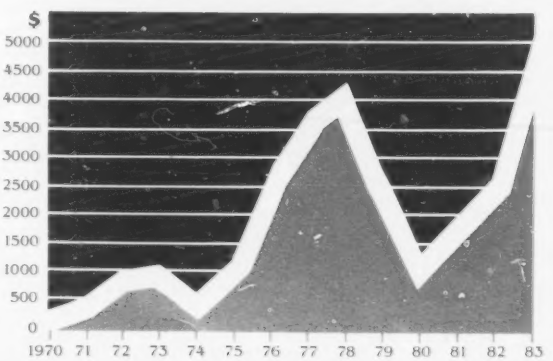
Truck Campers

Year	Value
1983	$ 36.1
1982	28.3
1981	20.3
1980	17.0
1979	47.5
1978	84.9
1977	98.5
1976	112.2
1975	112.0
1974	92.3
1973	166.9
1972	217.8
1971	253.6
1970	183.2



All Motor Homes*

Year	Value
1983	$5,098.6
1982	2,701.3
1981	2,018.1
1980	1,380.5
1979	2,725.6
1978	4,329.1
1977	3,875.8
1976	2,922.9
1975	1,250.0
1974	624.3
1973	1,152.8
1972	1,010.5
1971	572.5
1970	318.2



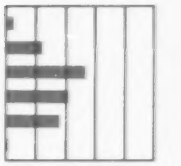
*Includes Van Conversions

Market Structure By Category and Length

Conventional Travel Trailers

Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 16'	3.3%	4.9%	4.1%	2.1%	3.0%	1.8%	1.5%	2.2%
16' to 19'11"	14.6	18.3	16.7	13.5	15.2	14.2	11.7	14.0
20' to 24'11"	31.8	31.4	34.2	30.8	38.4	42.9	39.8	47.6
25' to 29'11"	27.8	24.1	23.5	29.2	28.8	28.3	28.7	36.1[1]
30' to 35'	22.3	21.3	19.1	22.2	13.4	12.4	18.1	
Over 35'	0.4	0.1	2.4	2.2	1.2	0.5	0.2	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

1983 Market Share



Park Trailers

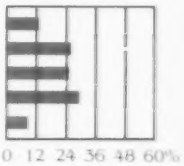
Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 20'								
20' to 24'11"	0.1%							
25' to 29'11"	0.5	0.2%	0.1%					
30' to 35'	58.2	58.3	63.0					
Over 35'	41.3	41.5	36.8					
	100.0%	100.0%	100.0%					

Market Share

Fifth Wheel Travel Trailers

Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 20'	12.8%	17.1%	10.5%	6.2%	1.7%	0.9%	2.1%	4.5%
20' to 24'11"	25.2	20.8	16.7	10.2	12.2	17.8	19.4	16.9
25' to 29'11"	24.3	18.1	17.2	16.6	19.5	22.6	28.0	32.6
30' to 35'	29.1	33.1	42.0	51.9	55.9	53.9	47.0	46.1[2]
Over 35'	8.6	11.0	13.7	15.2	10.7	4.8	3.5	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

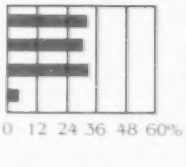
Market Share



Folding Camping Trailers

Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 8'	32.0%	33.8%	24.8%	17.7%	15.9%	14.1%	12.7%	9.6%
8' to 9'11"	30.7	30.6	26.5	29.1	37.9	32.1	29.0	28.1
10' to 12'	32.6	26.5	32.1	36.1	31.5	34.6	36.9	36.3
Over 12'	4.7	9.2	16.7	17.1	14.7	19.2	21.4	25.9
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

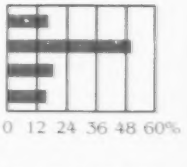
Market Share



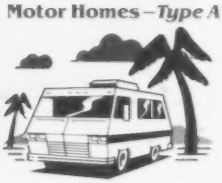
Truck Campers

Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 8'	16.5%	13.5%	18.7%	17.3%	13.5%	6.9%	8.5%	7.4%
8' to 9'5"	49.4	54.6	57.6	61.8	54.2	56.4	53.6	54.0
9'6" to 10'6"	18.1	17.1	14.2	12.7	19.1	20.4	20.5	20.1
Over 10'6"	16.0	15.1	9.5	8.2	13.1	16.3	17.4	18.5
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Market Share

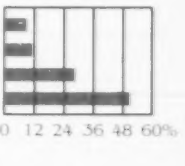


Motor Homes – *Type A*



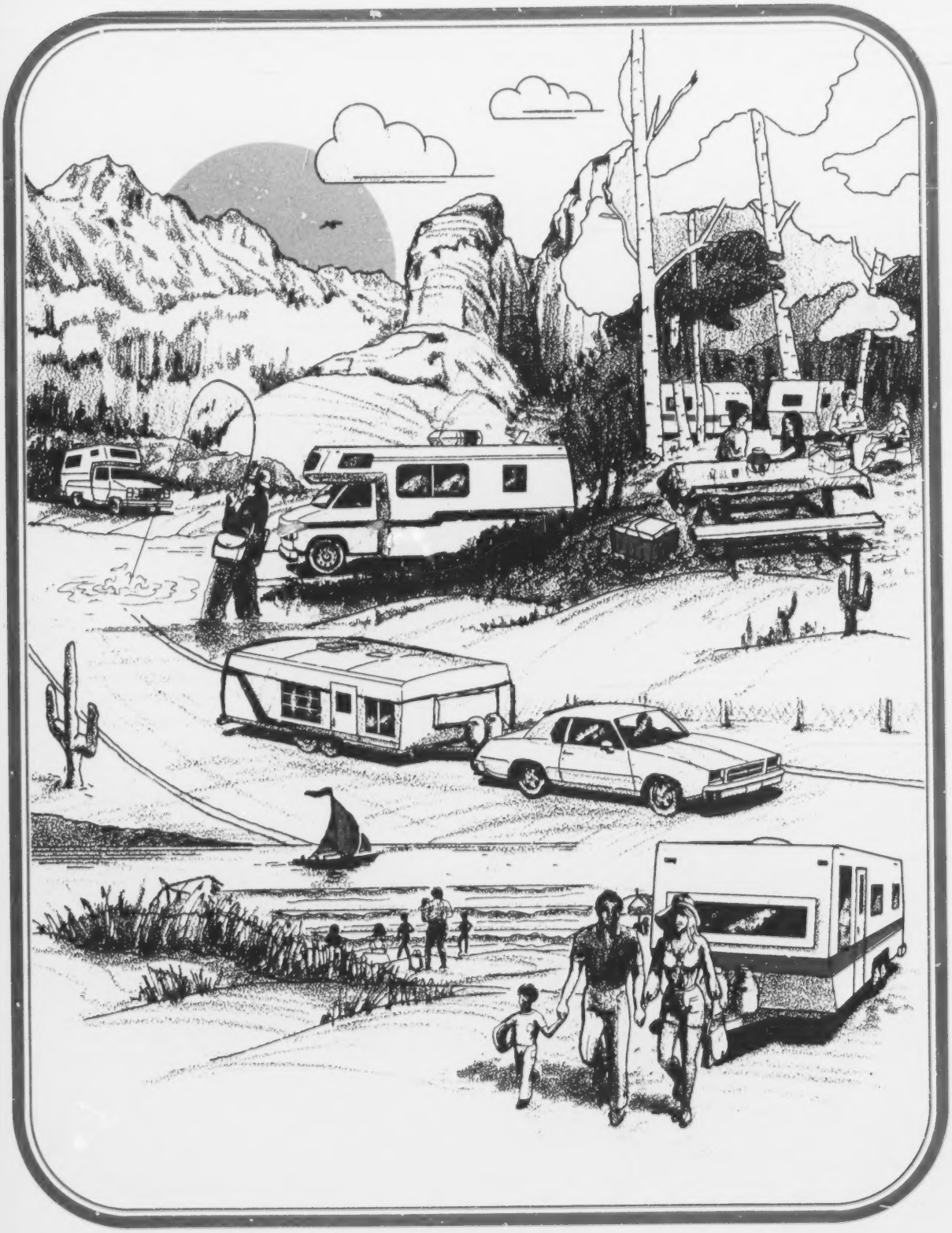
Length	1983	1982	1981	1980	1979	1978	1977	1976
Under 23'	8.9%	7.5%	2.1%	9.1%	7.7%	12.4%	8.8%	*
23' to 25'11"	11.3	18.7	37.0	29.7	40.8	43.6	47.3	*
26' to 29'	29.4	27.6	22.2	23.4	16.7	18.1	22.2	*
Over 29'	50.5	46.5	38.8	37.8	34.8	25.9	21.7	*
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Market Share



[1] Includes vehicles 25' and over.
[2] Includes vehicles 30' and over.
* Data are not comparable.

NOTE: Parts may not add to totals due to rounding.



The Consumer

Over the past several years RVIA has worked with many prestigious research groups in order to develop a picture of the RV consumer. Groups such as Stanford University, Robert P. Nathan and Associates, University of Michigan and the A. C. Nielsen Company have surveyed, collated and analyzed data gathered on current and potential RV owners. They have identified who the consumers are, where they are located, and what they look for in an RV when making the purchase decision.

This year we approached another respected organization, Yankelovich, Skelly and White, Inc., and commissioned them to provide a different insight to the RV owner. We asked them for an analysis of why RV sales are so strong and if this trend could be expected to continue. A synopsis of their findings follows.

The RV Market: A Social Values-Based Assessment*

In order to explore the role of leisure in the American value system, one must turn the pages of history back a few years. Back to the mid-40s.

In the years that followed World War II and up until the early 1960s, Americans wholeheartedly embraced a set of values commonly known as "the Protestant Ethic." Upward mobility was the goal. Personal economic well-being and national economic pride were its distinguishing characteristics. And the way up this "ladder of success" was to play by the rules, lots of rules. Hard work and personal denial were made for the good of the family, the employer and the community.

During this period, leisure time was earned, a reward for playing by the rules. But even then, it wasn't leisure time for self. It was time spent with the family or fixing up the house.

A lot changed in the '60s and '70s. Americans stood back and took a look around themselves and saw that all the hard work had finally paid off. They had reached their goal — economic well-being. And they began to develop what sociologists call a "psychology of affluence." Affluence was now assured and it was time to enjoy it.

Leisure time didn't have to be earned anymore, it was assured, a given, a right! Emphasis turned from self-denial to self-fulfillment.

The Changing Values of the '80s

Now in the 1980s, values are changing again. While the pendulum has not swung back to the '50s, there is a definite trend away from the "me" attitude of the '60s. Now the question is asked, "Did the 'me-generation' go too far?"

According to the study, there's a new realism about the future. Affluence is no longer assumed. The general attitude is not one of depression but by the same token, there is no assumption that the economic goals of the '50s or the self-fulfillment values of the '70s will work. People are trying to work out a comfortable framework for this decade.

The study emphasizes that this change and shift in values will point the way to a more strategic consumer in the years to come — a consumer who is taking on more of a problem-solving approach, is more thoughtful, less impulsive and generally doing more planning. This consumer appears to remain committed to leisure activity. In fact, according to the report, leisure has become institutionalized and very much a part of everyday life. And it is expected to remain that way.

At the same time, the public faces some time constraints on its leisure. There are a lot more two-earner households now and the baby boomers are becoming parents themselves. People are becoming more competitive in the workplace. They are willing to give more time to the job and they are channeling their energies there. All of this puts a squeeze on leisure time and consequently consumers are now more selective in terms of how they will spend their time, money and energy on leisure.

Recreation Vehicles As A Strategic Purchase

The findings of the study point out that this basic shift to a more selective consumer works very nicely in favor of the RV. A move to a more strategic, less impulsive value system adds a lot of pluses on the RV side of the ledger.

Today's consumers appear increasingly willing to spend money for products that will, over time, give them value options and a variety of experiences — a very strategic way to spend your money. They are turning away from the instant gratification, to a more long-term view; and a part of that view is emphasis on flexibility — keeping options open. With its many uses, the RV is viewed as giving a tremendous amount of value for the dollar. Consumers can amortize the cost over many trips to many different destinations.

Family Ties to Grow Tighter

Secondly, a renewed emphasis on family togetherness is taking place. There is a move away from the personal isolation of the me-generation to a reconnection with family and friends — family recreation, family leisure and quality time with children. This value shift ties nicely with what an RV-linked activity can provide, such as camping. People are looking for more family experiences. The RV fits in nicely here, too, because it's in line with the more cost-effective orientation of the strategic consumer; the RV provides comfortable family lodging at a relatively low cost.

Renewed Focus on the Home

Another social value that is being renewed is the focus on the home. Unlike the '70s, when life at home was considered

*The RV Market: A Social Values-Based Assessment
Prepared by
Yankelovich, Skelly and White, Inc.
for the
Recreation Vehicle Industry Association
©1983, Recreation Vehicle Industry Association

dull, drab and boring, many people now feel the need of belonging and the sense of permanence the home offers. Though this would appear to be a negative for the RV market, it is not necessarily so, for the value system of the '80s is shifting back in a direction of having and owning; less on experience and more on possession.

Renewed Emphasis on Self-Reliance

A fourth area of renewed emphasis is on self-reliance. In order to think strategically, the consumer is increasingly willing to rely on self to find out what is pertinent, what is the "right" path for "me." The impact is far-reaching and many-faceted. For instance, today's parents are teaching their children to be more self-reliant. They are preparing them to live in a tougher world. By extension such activities as camping teach certain kinds of self-reliance and make for a good learning experience —another plus for the RV market.

A Growing Sense of Regionalism

There is also a growing sense of regionalism in this country. People want to be a part of something greater than themselves. Family is part of this, but to a great degree a growing sense of involvement in community or region is taking place. As a result, it is expected that there will be more local travel, more desire to learn about the area we live in, and more of a desire to experience home-grown options. Such travel within a one day's driving distance favors options such as an RV. ■

The Strategic Consumer of the '80s

- Today's social values changing to a more strategic, less impulse-oriented, more "mature" values system—a *plus* for the RV ledger.
- Consumers think strategically—want value and flexibility, even for leisure—smart shopping for most cost effective way to achieve goals and preferred lifestyle.
- Consumer will spend money for product that will, in long run, give value, options, and variety of leisure experience.
- Renewed emphasis on family togetherness—camping (3rd most popular sport) fits in this category with sense of family adventure.
- Renewed focus on home—and permanence —still includes pent-up demand to get away, travel in cost effective manner. RV offers opportunity for experiences that cannot be duplicated at home; e.g., the wilderness, nature.
- Strategic customer likes RVs because:
  - —provide comfortable lodging at low cost
  - —long-term usage—as singles, newly married and with children
  - —offers perceived value for the dollar
  - —willingness to trade more space in RV for more money spent on fuel
- Strategic consumer wants to own something substantial—RV like second home—another facet of pride in home ownership.

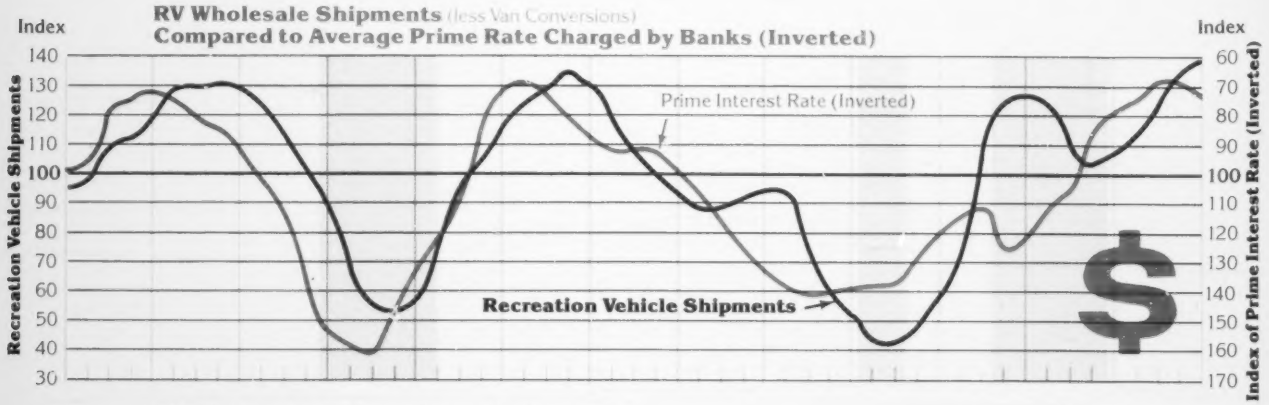
Appendix

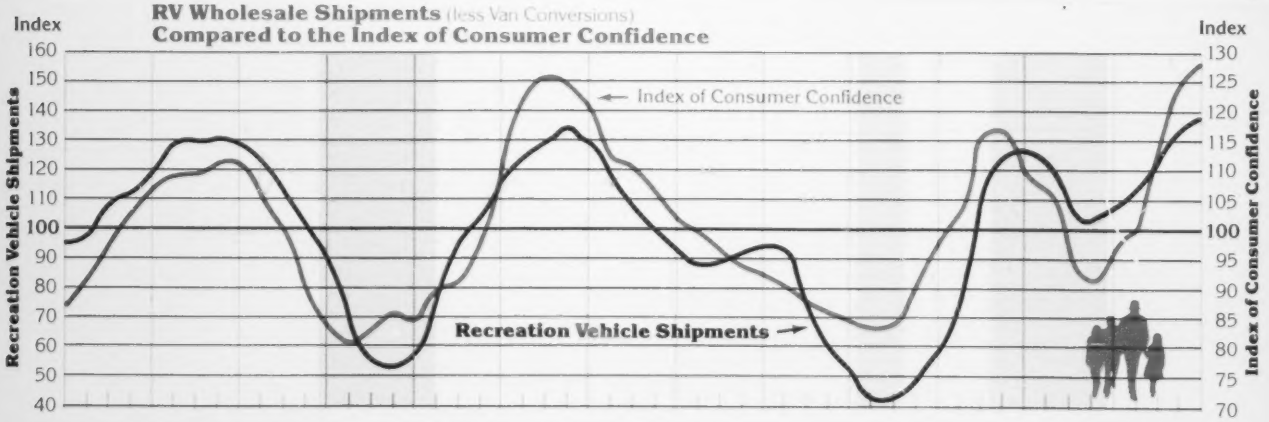
Cyclical Indicators

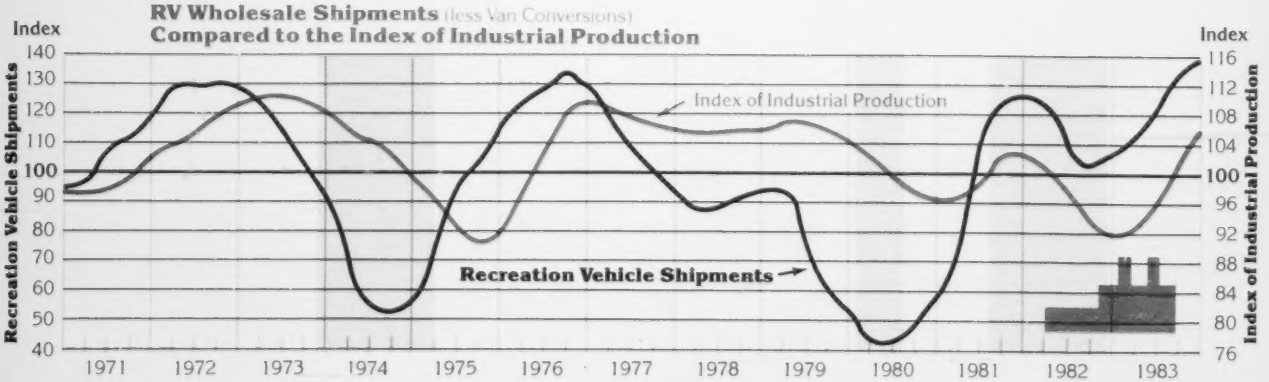
The charts below depict the rate of change of a twelve month moving average for Average Prime Rate Charged by Banks (Inverted),[1] the Index of Consumer Confidence,[2] and the Index of Industrial Production[1] compared to RV Wholesale Shipments (Less Van Conversions).[3] We've plotted them on different scales, RVs on the left and comparative indicators on the right, in order to keep the amplitudes about the same. The shaded areas represent periods of recession.

Notice that changes in the Prime Interest Rate lead RV sales while consumer confidence coincides. The final chart shows how Industrial Production lags the RV curve.

[1]Compiled by the U.S. Dept. of Commerce
[2]University of Michigan Survey Research Center
[3]Compiled by Recreation Vehicle Industry Association


RV Wholesale Shipments (less Van Conversions)
Compared to Average Prime Rate Charged by Banks (Inverted)
Index
Recreation Vehicle Shipments
Index of Prime Interest Rate (Inverted)
Prime Interest Rate (Inverted)
Recreation Vehicle Shipments
140 130 120 110 100 90 80 70 60 50 40 30
60 70 80 90 100 110 120 130 140 150 160 170


RV Wholesale Shipments (less Van Conversions)
Compared to the Index of Consumer Confidence
Index
Recreation Vehicle Shipments
Index of Consumer Confidence
Index of Consumer Confidence
Recreation Vehicle Shipments
160 150 140 130 120 110 100 90 80 70 60 50 40
130 125 120 115 110 105 100 95 90 85 80 75 70


RV Wholesale Shipments (less Van Conversions)
Compared to the Index of Industrial Production
Index
Recreation Vehicle Shipments
Index of Industrial Production
Index of Industrial Production
Recreation Vehicle Shipments
140 130 120 110 100 90 80 70 60 50 40
116 112 108 104 100 96 92 88 84 80 76
1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983

Shaded areas represent periods of recession

Vehicle Categories

Travel Trailer

A trailer designed to be towed by a motorized vehicle (auto, van or pick-up truck) and of such size and weight as not to require a special highway movement permit. It is designed to provide temporary living quarters for recreational, camping or travel use and does not require permanent on-site hook-up. A travel trailer can be one of the following types:

Conventional Travel Trailer

Ranges typically from 12 feet to 35 feet in length, and is towed by means of a bumper or frame hitch attached to the towing vehicle.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	$ 8,813	$ 7,320	$ 7,283	$ 7,124[1]	$ 5,548	$ 5,021	$ 5,287	$ 4,338
Retail	$11,016	$ 9,150	$ 9,104	$ 8,905[1]	$ 7,396	$ 6,694	$ 7,032	$ 5,759

Park Trailer

Designated for seasonal or temporary living. When set up, may be connected to utilities necessary for operation of installed fixtures and appliances. Built on a single permanent chassis mounted on wheels and capable of being towed without special highway movement permits by a motorized vehicle. Not more than 40 feet overall body length and no more than 8 feet in overall body width when in the traveling mode. Designed for set-up by person without special skills using only hand tools which may include lifting, pulling or supporting devices.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	$11,864	$11,534	$10,370	*	*	*	*	*
Retail	$14,830	$14,417	$12,963	*	*	*	*	*

Fifth-Wheel Travel Trailer

This unit can be equipped the same as the conventional travel trailer but is constructed with a raised forward section that allows a bi-level floor plan. This style is designed to be towed by a vehicle equipped with a device known as a fifth-wheel hitch.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	$10,965	$ 9,677	$ 9,647	$ 9,854	$ 8,348	$ 7,317	$ 6,840	$ 5,725
Retail	$13,706	$12,096	$12,059	$12,318	$11,134	$ 9,756	$ 9,118	$ 7,614

Folding Camping Trailer

A recreation camping unit designed for temporary living quarters which is mounted on wheels and constructed with collapsible sidewalls that fold for towing by a motorized vehicle.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	$ 2,510	$ 2,457	$ 2,316	$ 2,155	$ 2,006	$ 1,803	$ 1,714	$ 1,647
Retail	$ 3,263	$ 3,194	$ 3,011	$ 2,801	$ 2,677	$ 2,404	$ 2,285	$ 2,191

Truck Camper

A recreational camping unit designed to be loaded onto, or affixed to, the bed or chassis of a truck, constructed to provide temporary living quarters for recreational, camping or travel use.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	$ 4,051	$ 3,864	$ 3,072	$ 2,610	$ 2,580	$ 2,580	$ 2,317	$ 2,008
Retail	$ 5,266	$ 5,023	$ 3,994	$ 3,393	$ 3,442	$ 3,437	$ 3,089	$ 2,671

Motor Home

A recreational camping and travel vehicle built on or as an integral part of a self-propelled motor vehicle chassis. It may provide kitchen, sleeping and bathroom facilities and is equipped with the ability to store and carry fresh water and sewage. A motor home can be one of the following types:

Conventional Motor Home – Type A

The living unit has been entirely constructed on a bare, specially designed motor vehicle chassis.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$32,285**	$28,621	$26,196	$13,076	$19,605	$17,044	$18,731	$16,047
Retail	**$40,356**	$35,776	$32,745	$28,845	$26,137	$22,725	$24,968	$21,342

Van Camper – Type B

A panel-type truck to which the RV manufacturer adds any two of the following conveniences: sleeping, kitchen and toilet facilities, also 110 volt hook-up, fresh water storage, city water hook-up, and a top extension to provide more head room.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$16,262**	$13,234	$11,372	$11,319	$11,294	$10,542	$ 9,286	$ 6,768
Retail	**$20,328**	$16,542	$14,215	$14,149	$15,041	$12,650	$12,350	$ 9,024

Motor Home – Type C (Mini)

This unit is built on an automotive manufactured van frame with an attached cab section of a GVWR of 6500 pounds or more, with an overall height of more than eight feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$21,949**	$18,359	$16,649	$14,344	$12,819[2]	$11,672[2]	$11,072[2]	$ 9,025[2]
Retail	**$27,436**	$22,948	$20,811	$17,930	$17,093[2]	$15,562[2]	$14,759[2]	$12,033[2]

Motor Home – Type C (Low Profile)

This unit is built on an automotive manufactured van frame with an attached cab section having a GVWR of 6500 pounds or more, with an overall height of less than eight feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$20,153**	$20,833	$15,130	$13,210	*	*	*	*
Retail	**$25,191**	$26,041	$18,913	$16,513	*	*	*	*

Motor Home – Type C (Compact)

This unit is built on an automotive manufactured cab and chassis having a GVWR of less than 6500 pounds. It may provide any or all of the conveniences of the large units.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$15,006**	$13,827	$12,513	$10,609	*	*	*	*
Retail	**$18,758**	$17,283	$15,641	$13,261	*	*	*	*

Van Conversion

A completed van chassis modified esthetically or decoratively in appearance by the RV manufacturer for transportation and recreational purposes. These changes may include windows, carpeting, paneling, seats, sofas, and accessories.

Value	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$15,331**	$11,521	$ 9,587	$ 9,152	$11,199	$ 9,812	$ 7,305	$ 5,493
Retail	**$18,397**	$13,825	$11,504	$10,982	$13,439	$11,774	$ 9,715	$ 7,324

[1] Includes Park Trailers
[2] Average All Motor Homes – Type C
* Prior to 1980, data not surveyed